Alberta Tourism Market Monitor

Mixed signals from tourism indicators

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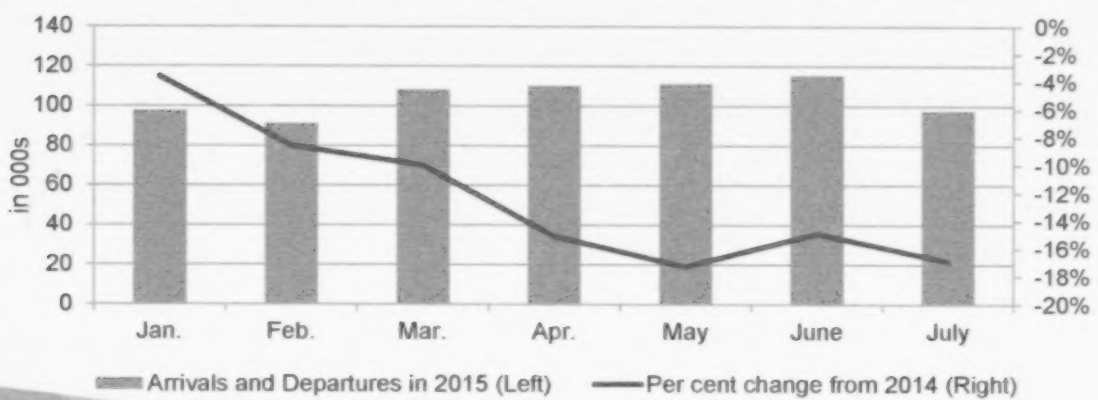
With Canada officially in a recession and persistent low oil prices in Alberta, the tourism industry, like many other industries, is showing signs of softening in some areas, but remains strong in other areas, as evident from the indicators tracked in the Market Monitor. The slump in oil prices since December 2014 has caused many energy and related businesses to cut down on business travel. This translated in average performances for Edmonton and Calgary's hotel industry. Calgary's occupancy rate edged up slightly (0.1%) compared to last July, while Edmonton's occupancy rate slipped by 1.2% compared to the same month in 2014.

On the other hand, the low Canadian dollar seems to encourage more travellers from the US and overseas to visit Canada (and Alberta), while it also helps to keep Albertans travelling within the province. In July 2015, visitor attendance at the three national Parks tracked in Alberta showed exceptional growth of 11.5%, which may point to a relatively strong leisure travel market (despite stagnating business travel). In July 2015, Banff welcomed more than 630,000 visitors (12.4% up from same month of the previous year), while Jasper recorded about 433,000 visitors (10.1% up from same month of the previous year). Waterton Lakes recorded about 114,300 visitors in July, an increase of 11.5% from July 2014.

Fort McMurray International Airport

Fort McMurray Airport became the third international airport in Alberta in 2013, together with Calgary and Edmonton International Airports. Starting from this month, the monthly statistics of arrivals and departures at the Fort McMurray International Airport have been added to the Monthly Market Monitor.

Arrivals and Departures at Fort McMurray International Airport



Alberta Government

2015 Alberta Tourism Market Monitor
Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2015 (000's of arrivals and departures) [1]													
Edmonton International Total	582.1p	561.6p	613.8p	592.7p	565.5p	598.8r	**683.7r**	**710.0p**					**4,908.2p**
Per cent change from 2014	-0.3%	-1.0%	-1.8%	-4.4%	-5.4%	0.9%	**2.5%**	**0.2%**					**-1.1%**
Domestic	398.2p	380.9p	421.4p	413.4p	438.7p	490.9r	559.6p	**583.4p**					**3,686.5p**
Per cent change from 2014	-2.7%	-2.9%	-1.3%	-5.9%	-4.6%	2.7%	4.4%	**2.0%**					**-0.7%**
Transborder	118.2p	119.7p	129.1p	119.3p	95.1p	82.5p	**93.5r**	**93.6p**					**851.1p**
Per cent change from 2014	-0.3%	-3.0%	-7.8%	-9.0%	-12.9%	-10.2%	**-10.1%**	**-13.2%**					**-8.0%**
International	65.7p	61.0p	63.2p	60.1p	31.6p	25.4p	30.6p	**32.9p**					**370.6p**
Per cent change from 2014	16.8%	17.9%	9.8%	21.8%	10.5%	9.0%	14.6%	**14.3%**					**15.0%**
Calgary International Total	1,199.0p	1,149.3r	1,267.0r	1225.7p	1,257.1p	**1304.8r**	**1519.5p**						**8,922.8p**
Per cent change from 2014	2.3%	-0.4%	1.5%	-2.3%	2.6%	**3.2%**	**5.1%**						**1.8%**
Domestic	800.6p	765.0p	839.7r	844.4p	909.8r	**955.1r**	**1106.6p**						**6,221.7p**
Per cent change from 2014	1.1%	-0.9%	2.3%	-2.9%	4.8%	**4.3%**	**5.2%**						**2.2%**
Transborder	254.6p	253.4p	280.9p	252.1p	237.5r	243.5p	**288.0p**						**1,810.1p**
Per cent change from 2014	1.8%	-3.0%	-3.7%	-6.3%	-4.6%	2.9%	**5.0%**						**-1.2%**
International	143.8p	130.8p	146.5p	129.2p	109.7p	**106.2p**	**124.9p**						**891.0p**
Per cent change from 2014	9.9%	8.0%	8.0%	10.6%	1.1%	**-5.8%**	**4.5%**						**5.4%**
Fort Mcmurry International Total	**97.6**	**91.0**	**108.1**	**110.1**	**111.3**	**115.4**	**97.5**						**731.0**
Per cent change from 2014	**-3.6%**	**-8.6%**	**-10.0%**	**-15.1%**	**-17.3%**	**-14.9%**	**-16.9%**						**-12.6%**
Highway Count 2015 (000's of vehicles) [2]													
Hwy 1 -Sask border w-bound	57.7	57.3	64.7	72.8	80.1	**85.4**	**111.1**						**529.1**
Per cent change from 2014	3.2%	2.3%	3.9%	1.8%	3.6%	**2.2%**	**6.8%**						**3.6%**
Hwy 1 - Banff Pk Gate (2-way)	501.8	505.5	544.6	568.2	679.2	**705.5**	**953**						**4,457.8**
Per cent change from 2014	6.1%	12.6%	9.1%	6.7%	15.9%	**6.9%**	**8.1%**						**9.2%**
Hwy 16 - Jasper Pk Gate (2 way)	96.3	92.8	111.7	123.4	149.2	**167.9**	**233.7**						**975**
Per cent change from 2014	4.9%	9.6%	6.2%	-1.0%	7.0%	**3.6%**	**4.1%**						**4.6%**
Hwy 16 - Blackfoot w-bound	164.1	146.6	170.8	177.8	186.6	**188.3**	**202.7**						**1,236.9**
Per cent change from 2014	-3.2%	-7.0%	-6.5%	-5.2%	-7.0%	**-5.9%**	**-7.8%**						**-6.2%**
National Park Attendance (000's of visitors) 2015 [3] Does not include Group Tours													
Banff	184.9p	188.6p	203.8p	246.7p	296.4p	**326.0p**	**630.5p**						**2,076.9p**
Per cent change from 2014	8.1%	14.6%	10.7%	6.7%	14.8%	**8.6%**	**12.4%**						**11.1%**
Jasper	52.8p	53.6p	64.1p	147.1p	178.1p	**200.8p**	**433.3**						**1,129.8p**
Per cent change from 2014	6.0%	11.1%	7.4%	3.5%	10.3%	**5.5%**	**10.1%**						**8.1%**
Waterton Lakes	6.7p	7.5p	9.3p	14.8p	39.2p	73.5p	114.3p						**265.3p**
Per cent change from 2014	3.5%	19.1%	47.6%	34.5%	26.9%	22.9%	11.5%						**18.8%**
Employment (000's of persons) 2015 Seasonally Adjusted [4]													
Accommodation and Food Services	156.9p	157.6p	155.9p	152.8p	157.1p	157.7p	154.4p	**155.1p**					**155.9p**
Per cent change from 2014	4.4%	1.5%	3.7%	0.9%	5.3%	9.2%	9.1%	**8.8%**					**5.2%**

Sources: Edmonton International Airport, Calgary International Airport, Alberta Transportation, Parks Canada, Statistics Canada.

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Accommodation Indices 2015 [4]													
Edmonton Occupancy Rate	54.4%	65.3%	67.1%	67.7%	64.3%	69.7%	**64.8%**						**65.0%**
Point change from 2014	-3.9	-2.8	-7.1	-7.6	-9.1	-0.1	**-1.2**						**-4.5**
Average Daily Room Rate	$131.29	$134.52	$135.93	$134.91	$133.27	$138.75	**$132.4**						**$136.53**
Variance from 2014	1.4%	1.0%	0.5%	0.2%	-0.8%	1.3%	**0.9%**						**0.1%**
Revenue per available room	$71.42	$87.81	$91.22	$91.40	$85.73	$96.77	**$85.77**						**$88.75**
Calgary Occupancy Rate	55.0%	61.8%	63.5%	64.1%	69.8%	70.2%	**78.1%**						**66.4%**
Point change from 2014	-3.0	-1.6	-4.1	-7.5	-1.1	-6.3	**0.1**						**-3.2**
Average Daily Room Rate	$156.48	$156.30	$156.76	$159.31	$159.78	$171.43	**$185.06**						**$164.73**
Variance from 2014	-0.4%	-3.3%	-2.0%	-2.8%	-2.2%	-7.1%	**-2.5%**						**-2.9%**
Revenue per available room	$86.08	$96.56	$99.56	$102.11	$111.55	$120.33	**$144.48**						**$109.32**
Alberta Resorts Occupancy Rate	40.8%	53.3%	48.8%	48.9%	60.6%	78.7%	**90.9%**						**60.5%**
Point change from 2014	2.8	7.8	3.7	2.7	-0.2	2.9	**2.9**						**3.2**
Average Daily Room Rate	$183.23	$177.86	$176.03	$170.91	$201.13	$260.92	**$294.18**						**$222.00**
Variance from 2014	10.5%	1.3%	5.4%	4.8%	6.8%	8.2%	**10.9%**						**7.3%**
Revenue per available room	$74.83	$94.88	$85.94	$83.51	$121.88	$205.47	**$267.52**						**$134.40**
Other Alberta* Occupancy Rate	52.5%	55.0%	53.3%	48.3%	51.3%	58.6%	**59.0%**						**54.1%**
Point change from 2014	-7.5	-11.5	-14.6	-11.4	-13.1	-8.3	**-9.5**						**-10.7**
Average Daily Room Rate	$133.36	$132.26	$131.29	$128.86	$126.21	$127.84	**$128.17**						**$129.83**
Variance from 2014	2.7%	1.1%	0.3%	-0.7%	-2.2%	-1.9%	**-1.5%**						**-0.2%**
Revenue per available room	$69.96	$72.74	$70.01	$62.20	$64.77	$74.90	**$75.63**						**$70.25**
Total Alberta (excl. Resorts)Occupancy Rate	53.8%	60.0%	60.2%	58.6%	60.4%	65.3%	**66.5%**						**60.9%**
Point change from 2014	-5.2	-6	-9.3	-9.0	-8.5	-5.3	**-4.1**						**-6.7**
Average Daily Room Rate	$139.70	$140.35	$140.75	$141.06	$139.71	$145.07	**$149.69**						**$143.17**
Variance from 2014	1.4%	0.0%	0.1%	-0.9%	-1.2%	-3.1%	**-0.2%**						**-0.7%**
Revenue per available room	$75.12	$84.22	$84.76	$82.69	$84.39	$94.68	**$99.53**						**$87.23**
Food Services and Drinking Places 2015 ($ Millions) unadjusted [6]													
Total Receipts for Alberta	$689.4r	$658.1r	$729.7r	**$719.6r**	**$765.0r**	**$740.6p**							**$717.1p**
Per cent change from 2014	6.0%	4.4%	1.6%	**1.6%**	**1.5%**	**0.4%**							**2.5%**
Historic Sites and Museums 2015 (000's of visitors) [7]													
Visitor Attendance	24.3p	42.4r	48.6p	48.5p	80.2p	113.0p	181.4p	**190.8p**					**729.2p**
Per cent change from 2014	3.4%	6.5%	26.2%	2.1%	3.5%	-2.2%	13.0%	**1.0%**					**5.4%**
Exchange Rates 2015 [8]													
Canadian Dollar/U.S. Dollar (noon)	0.81	0.80	0.79	0.81	0.82	0.81	0.76	**0.76**					**0.80**
Canadian Dollar/ Euro	0.71	0.71	0.73	0.75	0.74	0.82	0.69	**0.68**					**0.74**
Canadian Dollar/ Great British Pounds	0.53	0.52	0.53	0.54	0.53	0.52	0.49	**0.49**					**0.52**
Oil Price: Western Texas Intermediate (WTI) 2015 [9]													
Cushing, OK Spot Price (US Dollar per Barrel)	47.22	50.58	47.82	54.45	59.27	59.82	**50.9**	**42.87**					**51.62**

Sources: PKF Consulting Inc, Statistics Canada, Alberta Culture, Bank of Canada, WTI

*Other Alberta includes Lethbridge, Red Deer, and other Alberta communities

Note : New monthly figures are shown in bold type. Revisions will be bolded.
r=revised p=preliminary

Definitions of Indicators

1. Air Passengers - Numbers are preliminary estimates of air passenger arrivals and departures at the Edmonton International and Calgary International Airports.
Source: Edmonton International Airport , Calgary International Airport and Fort McMurray International Airport Websites.

2. Highway Traffic: These data are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year-to-date is a cumulative total for all vehicles.
Source: Alberta Transportation's Automatic Traffic Recorders (ATR). http://www.transportation.alberta.ca/3459.htm

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.
Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. The tour group data, however, are included in the annual edition of the Monthly Market Monitor.
Source: Parks Canada.

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay or profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.
Source: Statistics Canada, Labour Force Survey.

5. Accommodation Indices - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Other Alberta includes Lethbridge, Red Deer, and other Alberta communities.

Revenue per available room is calculated using the occupancy rate and average daily room rate.
Source: PKF Consulting Inc. with reproduction and use of information subject to PKF Disclaimer and Restrictions as detailed at www.pkfcanada.com.

6. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places.

7. Historic Sites and Museums - Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Paleontology, and the Tyrrell Field Station.
Source: Alberta Culture

8. **Exchange Rate**- this is the average monthly exchange rate.
Source: Bank of Canada.

9. Western Texas Intermediate - This is the average monthly oil price.

Source: Cushing, OK WTI Spot Price FOB.

21-Sept-2015